



***BRINGING EFFICIENCY AND CONSISTENCY
TO R&D MANAGEMENT***

Linking Proposals

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Introduction

This document will explain the process of linking, or logically relating two or more proposals to establish a connection or association between the proposals for a particular reason or business purpose. The linking procedures will be accomplished using the current functionality already available in the ePMA application.

Scope

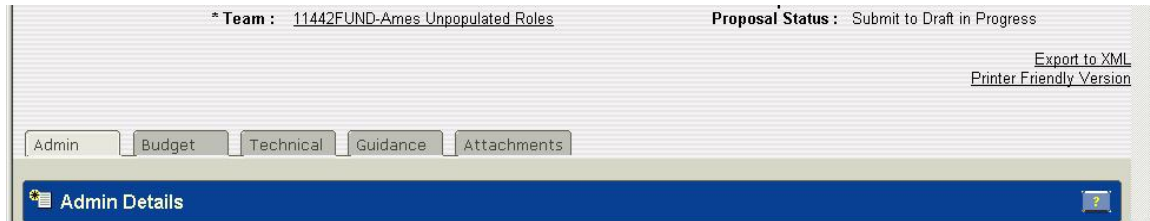
Working with the robust capabilities currently available to the users of ePMA, this document will identify three methods by which a proposal may be linked to another proposal. The following is a brief description of those methods:

- Capture the proposal data in a file and attach that file to the proposal using the External Attachments functionality
- Capture the proposal data in a file and attach that file to the proposal using the External Comments and Instructions 'Add Attachments' feature
- Capture the URL of the Proposal Details page of the desired proposal and link that proposal URL using the External Comments and Instructions 'Add Links' feature

Each of these techniques will be explained in the remainder of this document. This document will also offer some helpful hints, suggestions and reminders that the user of ePMA will want to be mindful of while performing the linking functionality.

Attaching a File Using External Attachments

In order to attach a proposal data file using the External Attachments functionality, you must first capture the proposal data in a file. While this may be accomplished in many ways, the recommended approach is to use the Printer Friendly Version link that is available to you on the Proposal Details page:



After clicking the Printer Friendly Version link, the proposal data is displayed to you onscreen. To save the data into a file, execute a normal Windows save operation using the File menu, then the 'Save As...' option from the File menu. The name you choose to save the file under will be displayed on the External Attachments screen, so use a meaningful name that will convey the appropriate information contained in the proposal data file.

Next, execute the actual linking process by navigating to the Proposal Details of the proposal to which you want to attach the proposal data file.

1. From the Proposal Details page, click the 'Attachments' tab located in the middle of the page. This will display the Attachments screen.
2. On the Attachments screen, select the Category under which you will attach the file.
3. Click the Add link under the Actions column. The Upload External Attachments screen is displayed.
4. At this point, either enter the file name with directory and path information directly into the file field, or simply use the normal Windows browse and select functionality to choose the file. Click the Save pushbutton when the file information has been entered.
5. The External Attachment screen is refreshed and displays the uploaded filename and other identifying characteristics of the file.

The two files are now linked via the External Attachments function.

Attaching a File Using External Comments and Instructions

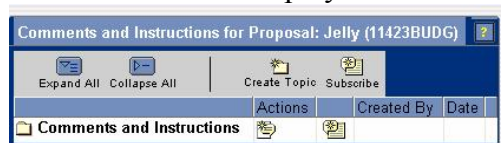
Using this method, you are going to attach a proposal data file using the External Comments and Instructions feature. This method is very similar to using the External Attachments, except that you are using the External Comments and Instructions as the attachment vehicle instead of the External Attachments. Again, in order to attach a proposal file, you must first capture the proposal data in a file. As mentioned previously, the recommended approach to capturing proposal data in a file would be to use the Printer Friendly Version link available on the Proposal Details page.

Once you have captured the proposal data in a file, navigate to the External Comments and Instructions feature of the proposal to which you want to attach the data file. The External Comments and Instructions are available in the upper-left corner of the Proposal Details page:

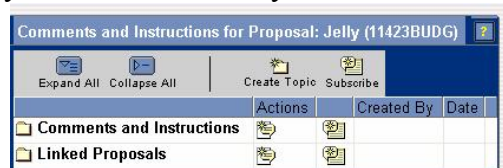


When you are ready to link the proposals:

1. Click the External Comments and Instructions choice on the menu bar. The Comments and Instructions screen is displayed.



2. Click the Create Topic choice on this screen to create a new folder for your linked proposals. The folder should be given a meaningful label.
3. The screen may look like this after you've created a new folder:



4. Attach a file under the new folder by clicking the icon to the right of the 'Linked Proposals' folder (in this example), under the Actions column. Note: if you hold the mouse over this icon, it will display the phrase 'Create Posting' because you are posting a file to this folder.
5. At the Create Posting screen, enter information into the Subject and Message fields and click the Next pushbutton. The second Create Posting screen appears

that allows you to add up to five files:

6. As previously mentioned, you may either enter the file name with directory and path information directly into the File field, or simply use the normal Windows browse and select functionality to choose the file. Click the OK Pushbutton to complete the linking operation.
7. The External Comments and Instructions screen is refreshed and displays the linked file, with message and subject information displayed as well. The screen may look like this after the link operation:

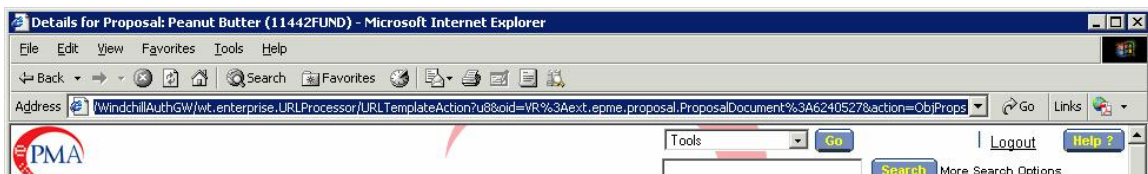
The two files are now linked via the External Comments and Instructions feature. When you return to the Proposal Details page, you will notice that the External Comments and Instructions now has a timestamp (on the menu bar) reflecting the most recent update to the External Comments and Instructions. It is no longer marked 'Currently Empty' as it was prior to attaching the file and linking the proposals.

Prior to Attachment

After Attachment Saved

Attaching a URL Using External Comments and Instructions

Using this method, you are going to attach the URL of the Proposal Details using the External Comments and Instructions feature. This method is very similar to attaching a file, except that you are linking the actual data page using the External Comments and Instructions. In order to attach URL information, you must first capture the Proposal Details URL that appears in the Address field of the ePMA web page as the Proposal Details are being displayed. In order to capture a proposal URL, navigate to the Proposal Details page of the proposal you want to attach to the original proposal. You will notice that the Address field of the web page contains a very long set of characters representing the URL address information. You must capture this information using the normal Windows Copy and Paste functionality. Simply put your cursor anywhere in the address field and right-click. The whole address will be highlighted, as seen below:



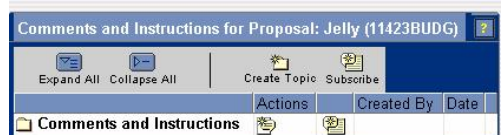
While the address information is highlighted, choose the Copy option from the drop-down menu. You have now captured the URL for the Proposal Details page of the desired proposal.

You are ready to link the two proposals. Navigate to the External Comments and Instructions feature of the proposal to which you want to attach the URL. The External Comments and Instructions are available in the upper-left corner of the Proposal Details page:



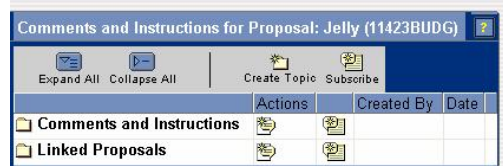
When you are ready to link the proposals:

1. Click the External Comments and Instructions choice on the menu bar. The Comments and Instructions screen is displayed.



2. Click the Create Topic choice on this screen to create a new folder for your linked proposals (if needed). The folder should be given a meaningful label.

3. The screen may look like this after you've created a new folder:

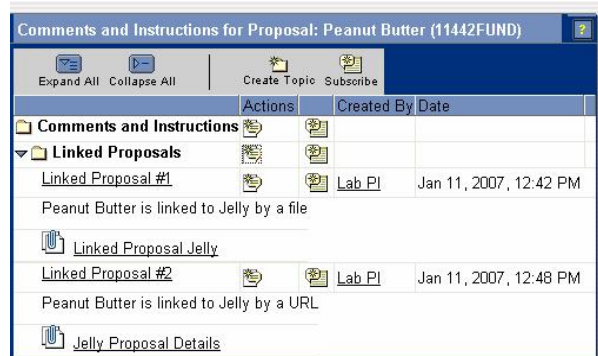




4. Attach the URL under the new folder by clicking the icon to the right of the 'Linked Proposals' folder (in this example), under the Actions column. Note: if you hold the mouse over this icon, it will display the phrase 'Create Posting' because you are posting a URL to this folder.
5. At the Create Posting screen, enter information into the Subject and Message fields and click the Next pushbutton. The second Create Posting screen appears that allows you to add up to five files:

6. In this scenario, you are not adding a file, instead, you are adding a URL, so click the Next pushbutton. The third Create Posting screen is displayed:

7. You may enter an optional Name in the Name field. In the URL field, put the cursor in this field and right click. Choose the Paste option from the drop-down menu and the URL from the Proposal Details of the desired proposal will be pasted into this field. Click the OK Pushbutton to complete the linking operation.

8. The External Comments and Instructions screen is refreshed and displays the linked file, with message and subject information displayed as well. The screen may look like this after the link operation:



Comments and Instructions for Proposal: Peanut Butter (11442FUND)		
Expand All Collapse All		Create Topic Subscribe
	Actions	Created By Date
Comments and Instructions		
Linked Proposals		
Linked Proposal #1		Lab PI Jan 11, 2007, 12:42 PM
Peanut Butter is linked to Jelly by a file		
Linked Proposal Jelly		
Linked Proposal #2		Lab PI Jan 11, 2007, 12:48 PM
Peanut Butter is linked to Jelly by a URL		
Jelly Proposal Details		

The two files are now linked via the External Comments and Instructions feature. When you click on this link ('Jelly Proposal Details' in this example), the Proposal Details page for the linked proposal will be displayed. When you return to the Proposal Details page of the original proposal, you will notice that the External Comments and Instructions now has a timestamp reflecting the most recent update to the External Comments and Instructions.

Hints and Reminders When Linking Proposals

The following items will assist you when linking proposals in the ePMA application.

- Only link proposals using the External Attachments or External Comments and Instructions. External objects attached to a proposal remain with the proposal throughout the life of the proposal, regardless of organizational boundary or workflow movement. If you attach an item using the Internal Attachments or Internal Comments and Instructions, that item will be deleted from the proposal when the proposal crosses any organizational boundary.
- Use the small shortcut box in the corner of the Create Posting screen to skip directly to the second or third Create Posting screen (Add Attachments and Add Links, respectively) when attaching a file or linking proposals using the URL. See the figure below:



- When deciding on which technique to use, remember that External Attachments can be replaced or removed. The External Comments and Instructions feature has no delete functionality associated with it.
- This next reminder is best illustrated by example: I have linked Proposal AAA and Proposal ZZZ. In this case, I have captured Proposal ZZZ's data into a file and linked that file to Proposal AAA; in essence, making Proposal AAA the parent and Proposal ZZZ the child. Although, I can discern that Proposal AAA is linked to Proposal ZZZ, either through viewing the attachments or comments and instructions, the converse is not true. There is no explicit indication on Proposal ZZZ that it is logically linked to Proposal AAA unless you perform the linking operation in reverse.
- Which ever method is chosen to link proposals together in the ePMA tool, please ensure that all users involved communicate regarding where to look for linkages, which types of proposals should be linked, etc. Communication among the organizations is the key to making this functionality successful.